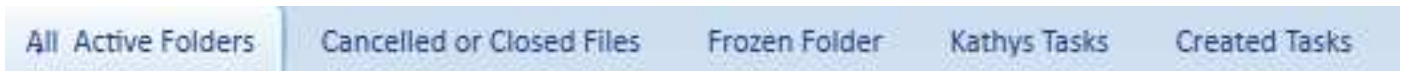


Easily Customize Your Home Screen by Copying Columns

You have customized the reports on your home screen with the exact columns you need and the report is just the way you want*. Now you want all the other reports on your home screen to have the exact same columns. What can you do to make this easier? Learn how with these few easy steps!

Configure View

On the Home screen, reports can be created based on the Folder's or Task's information. These reports are created in Advanced Search



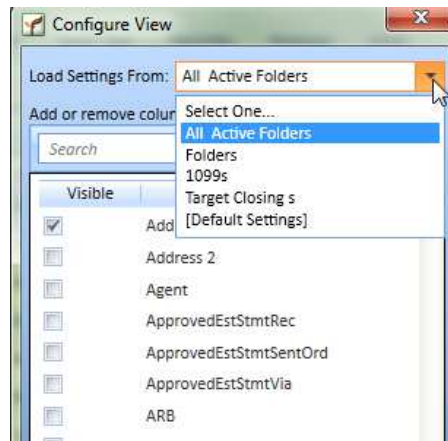
Example Folder and Task Reports

Begin by selecting the report you would like to customize. Click on the Columns icon located in the far right corner on your Home screen.

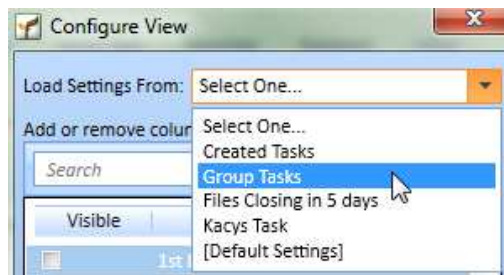


Adding Columns

To copy the column headers from one report to the report you have selected; click on “Load Setting From:” Select the report you want to copy. All the column headers established in the original report will now appear on the new report. Keep in mind that the reports created using Folder information and Task information are separate search types. Therefore, you can only Load Settings From a Folder Report to a Folder Report and a Task Report to a Task Report.



Load Settings From: Folders



Load Settings From: Tasks

*If you found this Leaf of Knowledge helpful, you may also enjoy LOK #1: Adding and removing Columns and LOK #45: Auditing. *Please refer to LOK #1 when setting up columns for the first time.*

For more information regarding this Leaf of Knowledge, please contact a member of the GreenFolders Support Team at 801-747-2132 or GFSupport@GreenFolders.com.
